

Get the Edge! Benchmarks, Tools and Training

Indiana Broadband Summit

May 30th, 2013

Jake Cowan, Senior Program Manager
Urban Libraries Council / Edge Initiative



**I'm an IU
Grad!**

Connect!



@LibraryEdge



@LibraryEdge



www.LibraryEdge.org



Session Overview

- (Re) Introducing Edge
- Edge Pilot Library Experience
- Edge Toolkit Preview and Participation Timeline
- Q&A and Exercise

EDGE INITIATIVE OVERVIEW



THE EDGE ROUNDTABLE

The coalition of leading library and local government organizations working on Edge includes:

- Bill & Melinda Gates Foundation –*funding partner for Edge*
- Urban Libraries Council – *the lead agency for Edge*
- American Library Association, OITP
- International City/County Management Association
- Lyrasis
- OCLC's WebJunction
- Public Library Association
- State Libraries of California, Oklahoma and Texas
- TechSoup Global
- Universities of Maryland and Washington



EDGE INITIATIVE GOAL

All people should have opportunities to enrich and improve their lives through open access to exceptional information, communication and technology services available in public libraries



WHY IS EDGE IMPORTANT TO PUBLIC LIBRARIES?

- Assess current public access technology and how it's used
- Identify ways to strengthen or enhance public access technology
- Engage with key leaders about the value of the public library in strengthening communities

THE EDGE TOOLKIT INCLUDES:

- **The Benchmarks Version 1.0**
- **Assessment Tool** for collecting and reporting library data
- **Resource Guide and Case Studies** for identifying ways to strengthen the library
- **Training** for public library staff
- **Communication Tools** for promoting your work with Edge
- **Executive Tool** for engaging key community leaders

VALUE OF EDGE TO INDIANA LIBRARIES

How libraries are talking about using Edge:

- Engaging local leaders on how the library helps achieve community goals
- Changing perceptions about library value - externally and internally
- Making decisions about allocation of library resources
- Identifying new ways of doing business based on peer best practices

EDGE INITIATIVE DEVELOPMENT

| Launched and Branded PAT Benchmarks Initiative | Beta Benchmarks Tested | Benchmarks Version 1.0 Released, Roll Out Plans Developed |
|--|---|---|
| March 2011 – January 2012 | Spring – Summer 2012 | January 2013 – June 2013 |
| <p>Initial Program Infrastructure Built:</p> <ul style="list-style-type: none"> • Developed Beta Benchmarks • R&D Program Design • Communications; Created new visual identity and brand (Edge) | <p>Beta Benchmarks Tested:</p> <ul style="list-style-type: none"> • National Beta Test • Surveys, focus groups, pilot • Incorporated feedback <p>Program Design Continued for Edge Toolkit</p> | <p>Version 1.0 Released at ALA Midwinter (January)</p> <p>Edge Toolkit Development Advances</p> |

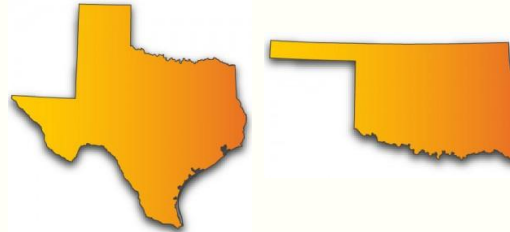
EDGE INITIATIVE ROLLOUT

| Soft Launch | Transition to National Launch | National Launch Campaign Begins |
|--|---|---|
| June 2013 – Sept 2013 | October 2013 – December 2013 | January 2014 |
| <ul style="list-style-type: none">• Edge soft launch in seven states (<i>Illinois, California, Connecticut, North Carolina, Oklahoma, Pennsylvania, Texas</i>) | <ul style="list-style-type: none">• Feedback from soft launch libraries will be used to make improvements to the Edge Toolkit and processes | <ul style="list-style-type: none">• Edge will roll out nationally in January 2014• Edge will engage the library field after the national launch to keep improving and evolving the Edge benchmarks and other tools |

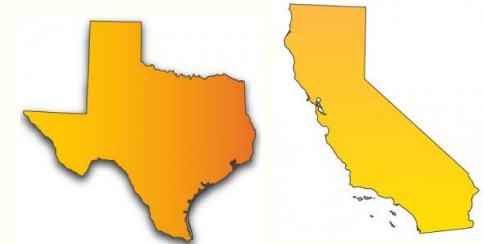
EDGE INITIATIVE PILOT TEST LIBRARIES



Two smaller libraries



Two larger libraries

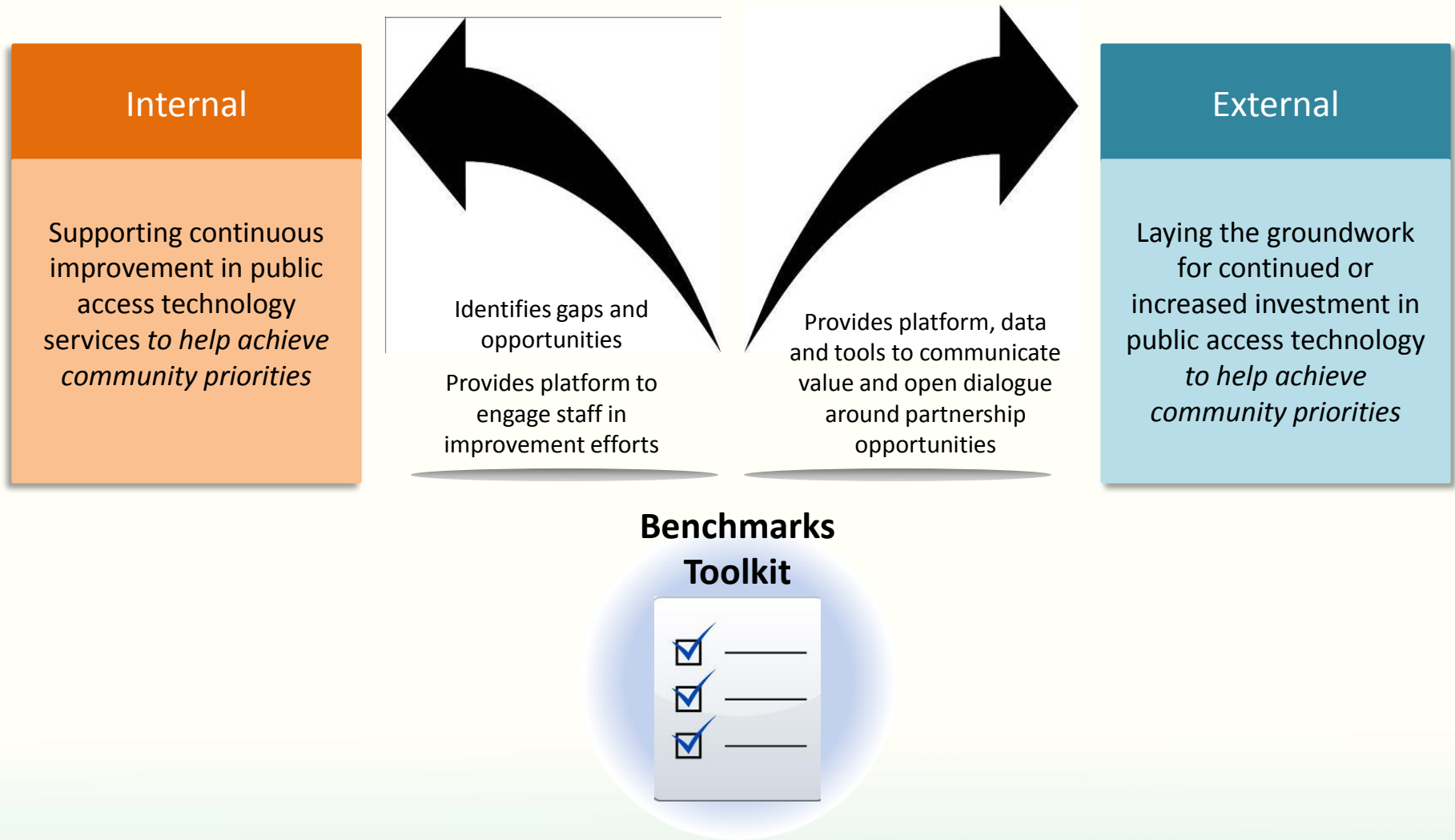


- Attended assessment training webinar
- Completed beta benchmarks assessment workbook
- Reviewed score report with assessment results
- Attended webinar and had individual calls to support understanding and utilizing results & development of communications for stakeholder presentations
- Presented results to select external stakeholders
- Participated in site visit = interviews with leadership, involved staff and external stakeholders



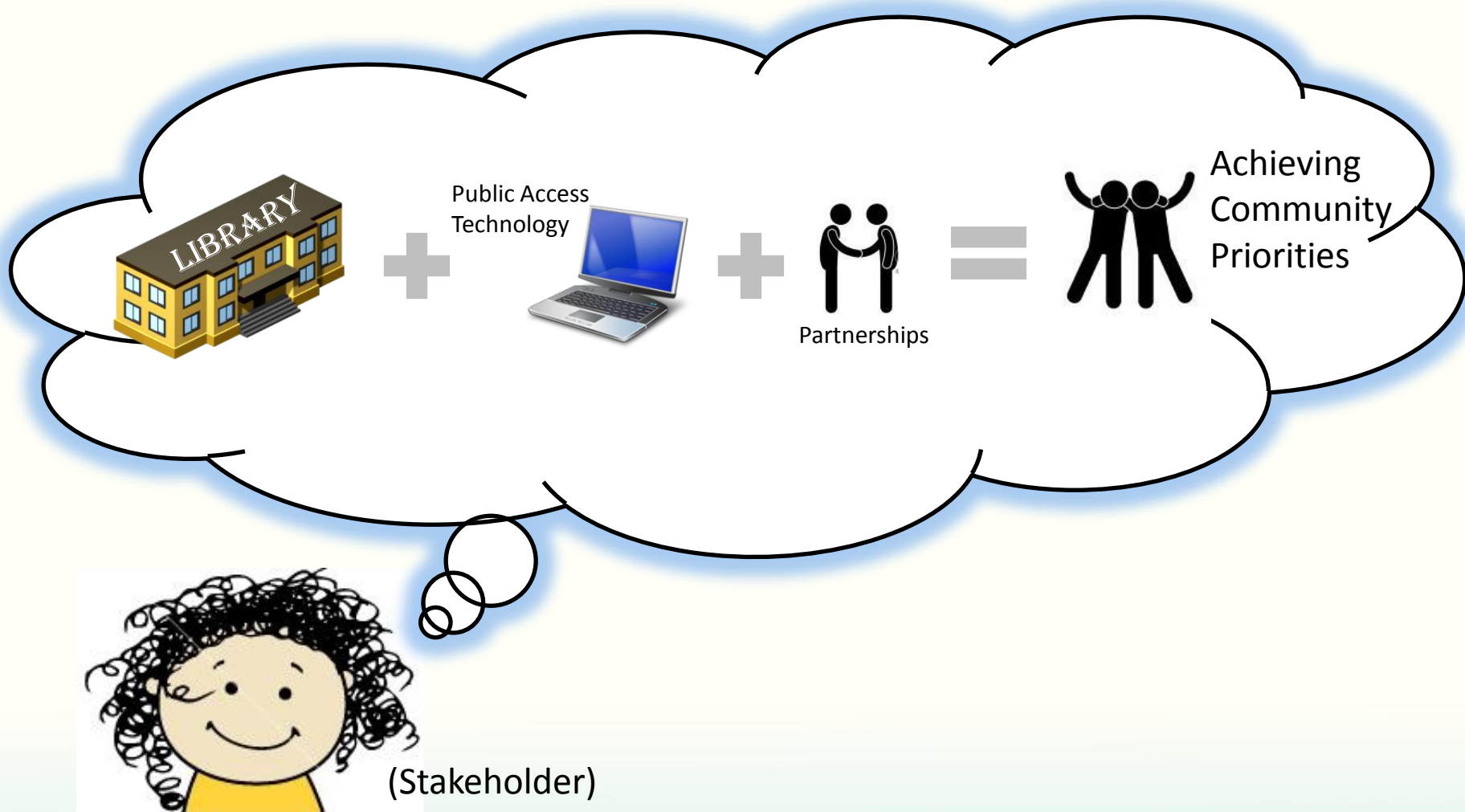
Key Finding:

Library leadership felt the benchmark framework was helpful for both internal- and external-facing purposes



Key Finding:

Presentations of results helped stakeholders connect public access technology in libraries to achieving community priorities



EDGE RESULTS IN PILOT LIBRARIES



Miami, OK

- Digital Literacy
- Strategic Planning Based on Community Priorities
- Library Staff Technology Expertise

New Braunfels, TX

- Strategic Partnerships
- Library Staff Technology Expertise
- Technology Inclusiveness



EDGE TOOLKIT PREVIEW



EDGE BENCHMARKS VERSION 1.0

11 benchmarks to
assess public access
technology services
across three main areas



V 1.0 BENCHMARKS: COMMUNITY VALUE

Benchmark 3:

Libraries provide technology resources to help patrons meet important needs related to personal goals and community priorities

The library supports the use of public technology for :

3.1 Workforce development and entrepreneurship

3.2 eGovernment or legal purposes

3.3 Patrons pursuing educational opportunities

3.4 Health and wellness purposes

We'll do an
exercise on this
benchmark
shortly!



V 1.0 BENCHMARKS: ENGAGING THE COMMUNITY

Benchmark 5:

Libraries build strategic relationships with community partners to maximize public access technology resources and services provided to the community

5.1 The library develops and maintains partnerships that amplify the library's reach, avoid duplication of effort, aid the library in planning or advocacy, or are otherwise mutually beneficial

5.2 The library engages in technology outreach activities

V 1.0 BENCHMARKS: ENGAGING THE COMMUNITY

Key Resource for Benchmark 5:

IMLS's Building Digital Communities Framework for Action



V 1.0 BENCHMARKS: ORGANIZATIONAL MANAGEMENT

Benchmark 8:

Libraries have sufficient staff with technology expertise to help patrons achieve their goals

8.1 The library provides staff with work time to engage in technology related learning activities

8.2 Library staff assigned to assist patrons are responsible for maintaining technology competencies

8.3 Staff assigned to assist patrons are able to answer patrons' technology questions

V 1.0 BENCHMARKS: ORGANIZATIONAL MANAGEMENT

Key Resource for Benchmark 8: Mitchell Community Public Library Case Study

Making Technology Training a Priority—And a Job Requirement

One librarian's tale of patience, planning, and persistence

Library: Mitchell Community Public Library

Location: Mitchell, IN

Librarian: Alexis Caudell



In this case study, we'll be looking at *Edge Benchmark 8: Library has sufficient staff with technology expertise to help patrons achieve their goals.*

Alexis Caudell, director of the Mitchell Community Public Library in Mitchell, Indiana, describes the challenges in training the entire staff of a small library and requiring them to keep their knowledge current. Happily, we learn about several solutions that work for this busy small-town staff, which has one building to serve a population of 11,943 across three townships.

Keeping up without slowing down

Keeping up with constantly changing technology has got to be one of the most difficult parts of library work today. Getting staff members up to speed and keeping them there requires time, attention, planning, money, and training. All of that is even more difficult when it's piled on top of the everyday work of making a library run. So, how do you find time for the "extra" work on top of the "real" work? Maybe you don't. Maybe you make the technology training a required part of the "real" work and support it with bite-sized training that fits into staffers' schedules.



This is how Alexis Caudell has made it work in the small town of Mitchell, Indiana.



ONLINE TOOL

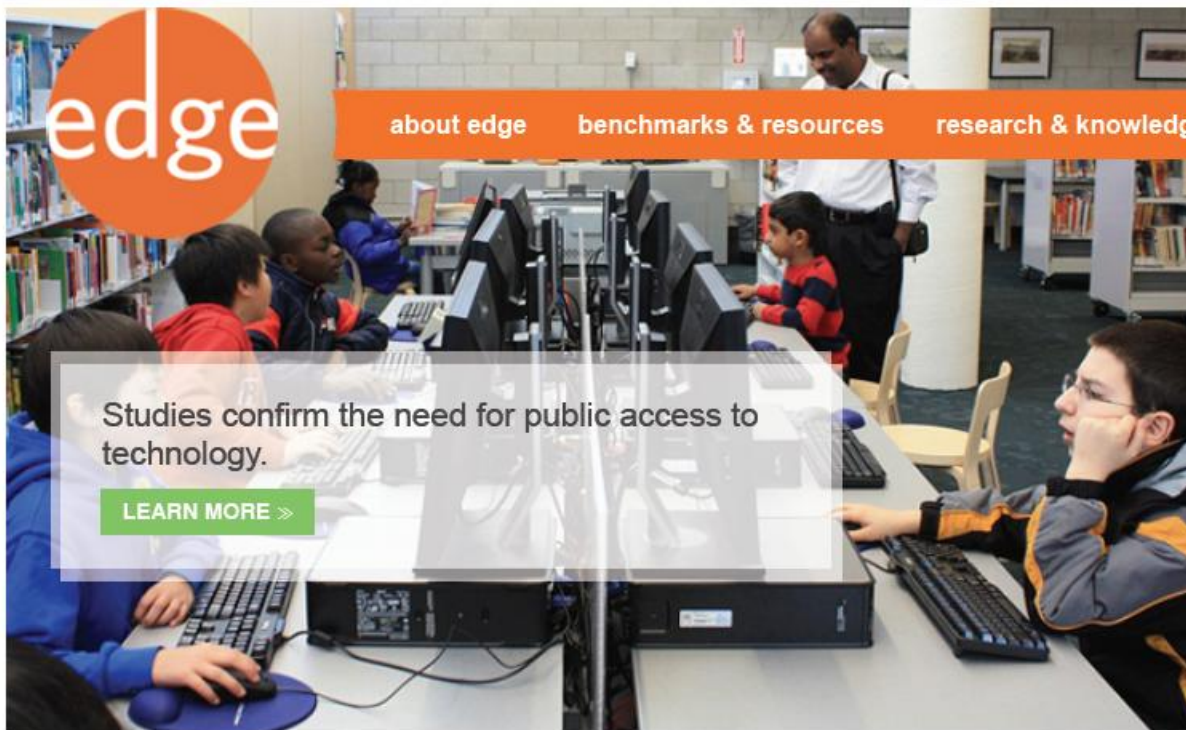
- Allows participating libraries to complete the assessment online
- Provides real-time assessment results and supporting reports
- Provide libraries a path to improvement through recommendations and resources
- Allows state libraries the ability to track progress and monitor trends

Online Tool

GET INVOLVED CONTACT US

Need an account? [Sign up](#)

[SIGN IN](#)



[about edge](#)

[benchmarks & resources](#)

[research & knowledge](#)

[glossary](#)

[news & events](#)

Studies confirm the need for public access to technology.

[LEARN MORE >>](#)

EDGE STRENGTHENS LIBRARIES

Edge is a nationally-recognized management and leadership tool. This research initiative provides resources that will highlight current policies and practices, ways to strengthen technology management, and enable library leaders to present data that showcases the outcomes the library is achieving and linking them to community goals. [Read More >](#)

The Edge Initiative is a voluntary, assessment program that includes benchmarks, best practices, tools and resources that support continuous improvement and drive reinvestment toward public technology. Edge gives libraries the flexibility to grow and plan for the future.

TOOLS AND RESOURCES

JUST RELEASED: EDGE BENCHMARKS VERSION 1.0

The recently completed Edge Benchmarks Version 1.0 is now available!

BLOG

Jan. 23rd 2013

Evaluate and continually improve public technology services with the Edge Benchmarks. After gathering extensive feedback from the library field and testing beta benchmarks...

Jan. 22nd 2013


Reduce downtime with these quick fix it tips (free webinar)

When a computer freezes or a printer jams,

Online Tool: Dashboard

[GET INVOLVED](#) [CONTACT US](#)

Hawaii State Public Library System [DASHBOARD](#) [SIGN OUT](#)

 [about edge](#) [benchmarks & resources](#) [research & knowledge](#) [glossary](#) [news & events](#)

[Dashboard](#)

[Library Profile](#)

[Results & Reports](#)

[Training Opportunities](#)

[Recommendations](#)

[Action Plan](#)

[Messages](#) 1 new

[Account Settings](#)

DASHBOARD

Step 1
Update library profile

Step 2
Take the assessment

Step 3
View results and reports

Step 4
View recommendations

Step 5
Manage action plan

Update library profile

INCOMPLETE

Instructions and other information lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis.

General Information

Library name, address, and website

Library Size

Population size served, number of full time employees, and operating revenues

Library Locations

Details for all library locations including hours, available technology, and bandwidth

[VIEW](#)

Complete step 1 to move to the next step.

[NEXT STEP >](#)

Online Tool: Taking the Assessment



[Return to LibraryEdge.org](#)
[Glossary](#)
[Help](#)

Please select a benchmark, then click *NEXT* to answer a series of questions. (Text appears gray for completed sections but menu items can still be selected.)

Community Value

- ☐ 1. Providing assistance and training with the goal of increasing the level of digital literacy in the community
- ☐ 2. Providing access to relevant digital content and enabling community members to create their own digital content
- ☐ 3. Providing technology resources to help patrons meet important needs related to personal goals and community priorities

Engaging Community and Decision-makers

- ☐ 4. Making strategic decisions based on community priorities for digital inclusion and innovation
- ☐ 5. Building strategic relationships with community partners to maximize public access technology resources and services provided to the community
- ☐ 6. Supporting continuous improvement in public access technology services by sharing expertise and best practices with other digital inclusion organizations

Organizational Management

- ☐ 7. Integrating public access technology into planning and policies
- ☐ 8. Sufficient staffing with technology expertise to help patrons achieve their goals
- ☐ 9. Sufficient devices and bandwidth to accommodate user demand
- ☐ 10. Managing technology resources to maximize quality
- ☐ 11. Ensuring participation in digital technology for people with disabilities

All sections are complete. To return to a group of questions, select the benchmark and click *NEXT*. To submit your results and calculate your library's score, click *SUBMIT* below and then click *NEXT*.

- ☐ **SUBMIT**

Online Tool: Taking the Assessment

Community Value Benchmark 1: Providing assistance and training with the goal of increasing the level of digital literacy in the community.

1.1. The library has curricula for and provides regularly scheduled digital literacy training.

| | Yes | No, but plan to do so in the next year | No, would like to but cannot at this time | No, we have no plans to do so at this time |
|---|----------------------------------|--|---|--|
| Curricula and classes are available in the following topics: | | | | |
| Basic computer skills | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Office productivity software (e.g. word processing, spreadsheets, presentations) | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Internet searching | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Privacy and security | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Library resources | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Social media | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Multimedia (e.g., photo, video, audio) | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Training is available for patron-owned devices (e.g., eReaders, iPods, tablets, smartphones). | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Technology classes are available in languages other than English. | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

To return to the menu, click 'Return to Menu', then click *NEXT*.

☒ Continue ☐ Return to Menu

NEXT

Online Tool: Sample Library Results Report

Benchmark 2

Libraries provide access to relevant digital content and enable community members to create their own digital content

2.1. The library supports the creation of digital content on public access computers.

| | Library response | Points achieved | Points possible | Level |
|---|-------------------|-----------------|-----------------|-------|
| Patrons have the ability to retrieve data from and store data to portable devices (e.g., thumb drives, external hard drives, PDAs) while using public computers | Yes | 10.00 | 10.00 | 1 |
| Office productivity software (e.g., word processing, spreadsheets, presentations) available at all outlets | Yes | 10.00 | 10.00 | 1 |
| Photo editing software is available in at least 50% of outlets | No plans to do so | 0.00 | 10.00 | 2 |
| Video/audio recording and editing software is available in at least one outlet | Yes | 5.00 | 5.00 | 3 |
| Web development software is available on at least one public computer in at least one outlet | Yes | 5.00 | 5.00 | 3 |
| | | 30.00 | 40.00 | |

2.2. The library monitors its service delivery of online content.


| | Library response | Points achieved | Points possible | Level |
|--|-----------------------------|-----------------|-----------------|-------|
| Website links are checked and content is updated at least monthly | Yes | 10.00 | 10.00 | 1 |
| Library website usage reports are reviewed at least quarterly | Yes | 10.00 | 10.00 | 2 |
| Subscription content (e.g., databases) usage reports are reviewed at least quarterly | No; plan to do so next year | 0.00 | 5.00 | 2 |
| A content inventory of the library's website is performed at least annually | Yes | 5.00 | 5.00 | 3 |
| | | 25.00 | 30.00 | |

Online Tool: Dashboard

[GET INVOLVED](#) [CONTACT US](#)

Hawaii State Public Library System

[DASHBOARD](#) [SIGN OUT](#)

[about edge](#) [benchmarks & resources](#) [research & knowledge](#) [glossary](#) [news & events](#)

Dashboard


Library Profile


Results & Reports

Training Opportunities

Recommendations

Action Plan

 Messages 1 new

 Account Settings

DASHBOARD

Step 1

Step 2

Step 3

Step 4

Step 5

Update library profile

Take the assessment

View results and reports

View recommendations

Manage action plan

View Recommendations

Instructions and other information lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis.

REVIEW TRAINING OPPORTUNITIES

Completing the assessment gives you access to Edge training curriculum.

REVIEW TRAINING OPPORTUNITIES


REVIEW RECOMMENDATIONS

Recommendations are provided based on your library's responses to the assessment.

REVIEW RECOMMENDATIONS

NEXT STEP >

Online Tool: Recommendations



ResourcesSupportHawaii State Public Library SystemDashboardLog out

Recommendations

Recommendations are made based on the responses given to the assessment questions. Each recommendation is graded on a scale of one to three. Lorem ipsum dolor sit amet, consectetur adipiscing elit.

DashboardLibrary InformationLibrary BranchesAssessment ScoresRecommendationsAction Plan

MessagesAccount Settings

Filter Recommendations (Showing all 75)

By FacetBy BenchmarkBy Level

AllAllLevel 1, Level 2

DOWNLOADPRINT

1.0

Community Value

Benchmark 1: Digital Literacy Training
Library staff and volunteers receive digital literacy training with the goal of increasing the level of digital literacy in the community.

1.1

The library provides monthly structured and scheduled digital literacy training located in at least half of its outlets in at least two of the following topics:

2.0

Provide monthly structured and scheduled digital literacy training for basic computer skills located in at least half of its outlets.
3 resources Level 1

3.0

Provide monthly structured and scheduled digital literacy training about Internet searching skills located in at least half of its outlets.
3 resources Level 2

Provide monthly structured and scheduled digital literacy training about social media located in at least half of its outlets.
5 resources Level 2

ADD TO ACTION PLAN

REMOVE FROM ACTION PLAN

ADD TO ACTION PLAN

Online Tool: Action Plan

[Resources](#)[Support](#)

Hawaii State Public Library System

[Dashboard](#)[Log out](#)

Action Plan

Use your action plan to set goals for the next year and track your library's progress. View an action item for resources to help you get started and add your own notes as you make progress.

[+ ADD FROM RECOMMENDATIONS](#)[DOWNLOAD](#)

Select:

[All](#) | [None](#)

Set Status

[REMOVE](#)

Action Item

Last activity

Status

☐

Provide monthly structured and scheduled digital literacy training for basic computer skills located in at least half of its outlets.

3/12/13

Not Started

☐

Provide office productivity software at all outlets available on public access computers for creating digital content.

3/12/13

Not Started

☐

Provide monthly structured and scheduled digital literacy training for basic computer skills located in at least half of its outlets.

3/12/13

Not Started

☐

Provide office productivity software at all outlets available on public access computers for creating digital content.

3/12/13

Not Started

☐

Provide office productivity software at all outlets available on public access computers for creating digital content.

3/12/13

Not Started

[Dashboard](#)[Library Information](#)[Library Branches](#)[Assessment Scores](#)[Recommendations](#)[Action Plan](#)[Messages](#)[Account Settings](#)

EXECUTIVE TOOL

The Executive Tool is a communications template that will help library leaders:

- **Demonstrate the library's connection** in achieving the strategic goals of the municipality and the community
- **Engage local leaders** in the critical role the library plays in addressing areas such as workforce development, education, and health and wellness

TRAINING OUTLINE

Community Assessment

Technology Management

Advocacy and Outreach

Library Leadership

TRAINING OUTLINE

- Training for public library staff will be available after the assessment is complete
- Training will be delivered via online, synchronous virtual classrooms; there is no in-person component
- Focus is on how to use assessment results to make strategic decisions, develop action plans and craft compelling messages about public access technology

STATE SUMMARY REPORTS

Benchmark 1

Library staff and volunteers provide assistance and training with the goal of increasing the level of digital literacy in the community.

54 / 60 pts
Average score

1.1

The library provides monthly structured and scheduled digital literacy training located in at least half of its outlets in at least two of the following topics:

20 / 30 pts
Average score

| Library Responses | Yes | No | No answer |
|---|----------|-----------|-----------|
| Basic computer skills | 45 (30%) | 63 (70%) | 0 (0%) |
| Office productivity software | 35 (25%) | 80 (75%) | 1 (2%) |
| Internet searching | 5 (7%) | 105 (93%) | 1 (2%) |
| Privacy & security | 8 (10%) | 35 (90%) | 3 (5%) |
| Library resources | 45 (30%) | 68 (70%) | 2 (4%) |
| Social media | 35 (25%) | 74 (75%) | 1 (2%) |
| Patron owned devices (e.g., eReaders, iPods, smartphones) | 5 (7%) | 85 (93%) | 0 (0%) |
| Provides technology classes in languages other than English | 8 (10%) | 100 (90%) | 0 (0%) |

PROCESS FOR PARTICIPATION WITH EDGE

When launched in 2014, public libraries in Indiana will be able to:

- Register to participate at www.libraryedge.org
- Download pre-assessment activities
- Start the online assessment, use the help desk as needed
- Complete the assessment, receive a summary report and access a resource guide and report templates
- Utilize results with internal and external stakeholders
- Participate in training

WHAT YOUR LIBRARY CAN DO NOW

To get ready to participate in 2014:

- Go to libraryedge.org to and fill out an interest form – you'll be among the first to hear updates and news about Edge
- Download the Benchmarks Version 1.0 and review with your staff
- Participate in the U.S. Impact Survey (Impactsurvey.org)

WHAT IS THE IMPACT SURVEY?

An easy way to survey your patrons about library services

Understand and meet the unique needs of your community

It is a prepared, validated survey tool that helps libraries:

- Gather information about how patrons use their technology services
- Analyze collected data to inform internal planning and benchmarking
- Present findings to key stakeholders to advocate for technology services
- Go to ImpactSurvey.org *this June*



BENCHMARK 3 EXERCISE

1. Complete the “quiz” at your tables

2. Table Discussion

- How many of these activities does your library offer?
- Did you identify a resource to look up and consider using in your library? Which one(s)?
- Which of these activities would be the highest priorities for your community? How would you find this out?
- What else did you learn about your library from this exercise? Any surprises?

3. Report Back